



From Your Partners at Panoramix

Happy June, all! We've had an exciting start to the month, topped with learning we're a four-time finalist for the WealthManagement.com Wealthies awards, for the third time in a row! We've also added another exciting integration to Panoramix--you can now use AdvicePay with your billing!

New Panoramix Release Today

Version 2.1.0.17 is ready for download! Owing to the massive efforts going into larger projects, the release notes are short.

[Read all the enhancements here.](#)



NEW: Use AdvicePay in Panoramix!

We've added an exciting new integration! If you use AdvicePay for your directly invoiced clients, you may now generate those invoices directly via an API integration. No need to create a separate spreadsheet or manually input items into AdvicePay. Plus, Panoramix now handles your direct invoiced fees for net of fees reporting.

[Click here to learn more about AdvicePay.](#)



Notice about Gmail in Panoramix

As of May 31, 2022, Google ended support for using only a Gmail username and password for hooking up your Gmail account to Panoramix. You must now use an App Password. Specific steps vary based on the type of Gmail account you have. In general, you must enable two factor authentication for your Gmail account and then add Panoramix as an authorized application and obtain an App Password for it. Then you must use that App Password (copy and paste) in Panoramix for your access credentials under Settings > Data Settings.



Panoramix YOUNiversity May Session Now Available

The May session of Panoramix YOUNiversity is out! Here's your chance to learn about the new client portal, as well as new features in billing and performance reporting.

[Watch the May YOUNiversity session here.](#)

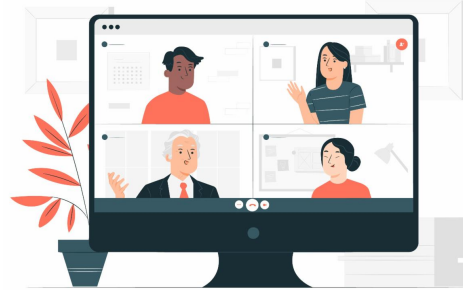
[Register for our Webinars here.](#)



Monthly Support Open Forum

Mark your calendar to join us for our next support forum on June 14 at 1:00 p.m. central time. Register below to receive access to our forums via email.

[Register for our Monthly Support Forums here.](#)



Panoramix in the News

RIABiz.com

[An unprecedented wave of 'disruptive' competitors are challenging 'The Big Four' RIA performance reporting firms by thinking past 'the cloud' and bundles](#)

Think Advisor

[An Inside Look at the Technology Advisors Like: Panoramix takes the lead in customer satisfaction](#)

WealthManagement.com

[2022 Wealthies Finalists announced: Panoramix is a four-time nominee](#)

Technology Tools for Today

[T3 Observations from Bob Veres: Panoramix announced the launch of Panoramix Pro](#)

Tips & Tricks for Panoramix

Did You Know?

Have you ever found yourself looking for the particular value of a particular holding at a specific point in time? We have a blotter for that!

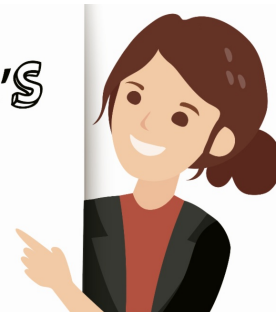
The Security Values blotter allows you to reference symbols, identifiers and fund names, with the option to display weekends, set a start date, include \$0 accounts and adjust the number of days you see in the results.

The blotter is home to loads of data across the 18 variations we have available. If you ever want a blotter tutorial, reach out and/or pay a visit to our monthly open support forums, and we will happily show you the ropes!

If you ever have questions, reach out anytime, we're here to help you!

- Email the Support team at Support@PanoramixFinancial.com.

ADEENA'S
TIPS &
TRICKS



- Call Adeena on the Support phone line at 877-595-3282, or call/text her cell directly at 360-702-7718. She comes online every day at 8am Pacific/10am Central.
 - [Schedule a meeting with Adeena here.](#)
 - [Schedule a meeting with Joe here.](#)
 - [Schedule a meeting with multiple Support staff here.](#)
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